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MARINE FISHERIES OF WESTERN GERMANY, 1970-71

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SUMMARY

The West German fishing and fish processing industry in 1971 did not fare as well as previously. The catch decreased 17 percent from the previous year, but the value gained slightly. With costs further increased, the prices for certain products rose and demand slackened. Despite the unfavorable trend, the production of deep-frozen fish and fillets increased 37 percent. The 50-percent drop in the herring catch caused a decrease in production of traditional herring products. Fish meal production declined 13 percent, but this deficit was more than made up by increased imports.

A program for construction of 15 new freezer vessels by 1975 is expected to improve the deep-sea fishery industry. The prospects for developing the distant water fishery are hampered by increasingly heavy pressure on the stocks of conventional species in the North Atlantic and the Norwegian Sea and by international conservation efforts to control their exploitation. Preliminary reports for 1972 indicate that catches again declined. The overall demand for fish should continue to expand and domestic supplies must be increasingly supplemented by imports.

CATCH

In 1971, the West German fishing fleet caught 492,560 metric tons, live weight, -- a 17-percent decline (table 1). The value to the fishermen increased slightly to US\$109 million. The distant-water trawler fleet based mainly at Bremerhaven and Cuxhaven landed about 70 percent of the catch. This fleet caught 345,348 tons in 1971, about 60,000 tons less than in 1970 (table 2), but the value of the catch increased. The fleet became less active mainly because of heavy ice conditions in the fisheries off Labrador and a 37-percent drop in the herring fisheries in the Northwest Atlantic, mainly on Georges Bank. Fishing off the east coast of Greenland was more favorable for cod, and the fishery in waters off Iceland was favorable for saithe. The trawl fishery in the Northeast Atlantic declined. The distant water fleet had 94 vessels, of which 67 were fresh-fish trawlers and 27 were freezer trawlers. The fresh-fish trawlers operate mainly on the Icelandic and Faroese grounds whereas the freezer trawlers operate mostly off Greenland, Labrador, Newfoundland, and New England.

^{1/} Prepared by the International Activities Staff based on information provided by the Federal Ministry of Food, Agriculture and Forestry, Federal Republic of Germany.

About 28 percent of the catch was landed by the cutter and the lugger fleets (table 3). This fleet has almost 1,000 inshore and middle-water cutters operating in the North Sea and the Baltic and about 10' luggers which produce mainly salted herring. Their 1971 catch of herring declined 63 percent, but the cod fishery in the North Sea and Baltic gained 61 percent. The shrimp catch also declined substantially. Despite a decrease of 21 percent in total landings, this fleet attained a record value of US\$25.3 million. More of the fish went into human consumption, less into fish meal.

Table 1.--West German catch by major species, 1970-71

Species	1970		1971	
	<u>Metric tons</u>	<u>Million US\$</u>	<u>Metric tons</u>	<u>Million US\$</u>
Cod	174,335	29.0	193,191	45.0
Haddock	8,858	1.4	5,980	1.4
Herring	166,285	20.0	83,568	13.4
Redfish	71,552	16.5	70,229	19.6
Saithe	60,433	9.7	60,202	11.0
Shrimp and crab	38,448	4.7	25,042	5.1
Other	71,500	13.3	54,348	13.4
Total	591,411	94.6	492,560	108.9

Table 2.--West German catch by distant-water trawlers
1970-71

Species	1970		1971	
	<u>Metric tons</u>	<u>Million US\$</u>	<u>Metric tons</u>	<u>Million US\$</u>
Cod	136,574	22.7	132,181	33.1
Haddock	3,727	.7	2,921	.9
Herring	109,857	16.1	62,054	10.8
Redfish	71,209	16.5	70,227	19.6
Saithe	53,447	8.9	54,981	10.3
Other	30,675	7.8	23,074	7.6
Total	405,489	72.7	345,438	82.3

Table 3.--West German catch by inshore and middle-water cutter fleet
1970-71

Species	1970		1971	
	<u>Metric tons</u>	<u>Million US\$</u>	<u>Metric tons</u>	<u>Million US\$</u>
Cod	37,630	6.2	60,636	11.8
Herring	53,813	3.3	19,691	2.0
Plaice	5,772	1.4	3,469	1.1
Sole	323	.4	584	.9
Sprat	7,793	.3	5,193	.2
Shrimp and crab	38,448	4.7	25,042	5.1
Mussels	9,609	.4	5,622	.3
Other	24,048	3.8	19,273	3.9
Total	177,436	20.5	139,510	25.3

In 1971, about 92,200 tons or 19 percent of the total catch were from fishing grounds off North America (table 4). In 1970, 26 percent were caught in that area.

Table 4.--West German catch by major fishing grounds, 1970-71

Fishing ground	1970	1971
	<u>Metric tons</u>	<u>Metric tons</u>
New England-New Jersey	92,800	59,900
Newfoundland	11,900	12,300
Labrador	50,500	20,000
Greenland	76,500	86,900
Iceland	111,800	124,700
Faroe Islands	5,100	6,700
Bear Island	4,400	6,100
Barents Sea	4,500	2,600
Norwegian coast	28,900	18,100
North Sea	147,000	112,100
Baltic Sea	38,000	33,000
South Atlantic	600	-
Other	25,600	10,200
Total	597,600	492,600

THE FLEET

In 1971, the number of trawlers and cutters decreased again as the result of a scrapping program and sales to other countries. Many older stern trawlers and side trawlers equipped with deep-freezing facilities were converted for fresh-fish trawling. These conversions created a demand for additional freezer trawlers in order to keep up with the market demands for frozen fish. The government granted loans for 15 new freezer trawlers to enter the fishery by 1975.

The development prospects for the distant water fleet are hampered by increasingly heavy pressure on the stocks of the conventional species in the North Atlantic and the Norwegian Sea. If the overall demand for fish expands as expected, larger and more powerful freezer trawlers will gradually replace vessels that are obsolete because of their age and size. Six new large freezer trawlers entered the fishery during 1972 as part of the government's fleet development program. Preliminary reports for 1972 indicate that catches by the West German fleet again declined owing to lower catch rates and fewer vessels actually fishing.

The number of cutters dropped from 958 to 921, and luggers from 14 to 10. The GRT of the cutter fleet remained about the same, because new vessels entering the fleet were larger than those withdrawn. In 1971, difficulties were encountered in finding adequate crews. The number of fishermen engaged dropped from 7,200 early in 1971 to 6,407 on January 1, 1972.

The Federal Government aims to safeguard the present level of activities of the German fleet and improve and modernize their operations. Three research vessels are permanently engaged in examining the state of different international fish stocks or testing new catching equipment and methods.

West Germany is a prominent member of International Commission for the Northwest Atlantic Fisheries (ICNAF) and the Northeast Atlantic Fisheries Commission (NEAFC). West Germany has a very short coastline and must depend largely on its fisheries on the high seas and off other countries.

PROCESSING AND MARKETING

The production and economic results of the processing industry were not considered satisfactory in 1971. Increasing costs of fish production and lower prices on competitive foodstuffs resulted in lower financial returns to processors. Fluctuating exchange rates seemed to have negative influences on exports. Marketing of fishery products was also made difficult by exaggerated news reports about pesticides in fish and fish products.

The total supply (landings and imports) of fish and fishery products to the consumer was about 10 percent below 1970. The 6-percent decrease in sales was attributed to higher prices for most products. Salaries and wages increased by 7 percent. Prices for fish products reached a level which made it difficult for them to compete with other products.

The production of deep-frozen convenience food rose by over 10 percent and deep-frozen fish and fillets by about 37 percent (recovered from a decrease in the previous year). A decrease in production of other traditional products resulted from increased prices and a limitation on herring catches which held down sales. Herring supplies (stocks, production, and imports) were about 200,000 tons in 1971 for the processing and fresh-fish trade, down 8,800 tons from 1970.

Fish meal production at 8 land-based plants was 46,481 tons, and production at sea was 16,231 tons, totaling about 13 percent less than the year earlier. Imports, however, which totaled 516,000 tons, more than made up the difference. Per capita consumption of fish is about 11 kilograms (24 pounds), a level which has remained rather constant in recent years.

FOREIGN TRADE

West Germany imported 282,000 metric tons of fish products in 1971, up about 2 percent from 1970 (table 5). Fresh and frozen herring made up 111,385 tons or 39 percent of the total.

Denmark is the main supplier of whole fresh herring and fresh "butterfly" fillets. Great Britain is the major source of whole frozen herring and of considerable quantities of whole fresh herring and frozen "butterfly" fillets. Norway, the Netherlands, Canada, and the United States are the other main sources of herring. Total frozen herring imported were 17,541 tons. The United States supplied 2,859 tons of herring fillets, Canada 5,655 tons--both up substantially from 1970. Denmark sold 66,578 tons of herring to Germany. The floating of the currency (DM) and the realignment of other currencies adversely affected this trade.

The bulk of the fish meal comes from Peru (348,965 tons, followed by Chile (53,416) and Norway (45,756).

West German exports total 79,811 tons, valued at US\$83,298,000, largely consisting of fresh and frozen fish and canned fish. In 1971, the Common Market countries purchased 60 percent of West German fish exports. Fish meal exports were 43,396 tons, valued at US\$15,024,000, mainly to Austria and Switzerland.

Table 5.--West German imports of fish products, 1970-71

Fish products	1970		1971	
	Metric tons	Million US\$	Metric tons	Million US\$
Fresh & frozen herring	99,502	31.2	111,385	39.9
Salted herring	19,748	10.0	19,514	11.7
Other fresh & frozen sea fish	113,319	69.8	104,654	86.7
Canned fish	31,216	36.0	29,928	39.3
Other	13,849	21.2	16,455	27.2
Total	277,634	168.2	281,936	204.8
Fish Meal	499,203	107.8	516,088	117.4
Fish Oil	113,334	29.5	124,152	34.1
Solubles	30,963	2.8	27,907	2.5

GENERAL OUTLOOK

Considerable anxiety has been expressed in the industry that a policy and structural change brought on by the developing Common Market fishery policy could further harm the already slumping West Germany fishing industry. The initial change was the adoption of a common marketing policy for fish products. The Council of the European Community decided on October 20, 1970, to fix guide prices, withdrawal prices, and official intervention prices for certain major fishery products. The entry of Denmark and Britain will gradually provide stronger competition to the West German market, since these countries will face lessening tariff barriers for some of their major commodities like fillets and canned fish. These could supply large volumes at production costs that would hamper development of the West German fishing industry. Many West German experts feel that their government must continue its policy of aiding the restructuring and rebuilding the fishing fleet, with emphasis on both deep-sea vessels for fresh fish and freezer trawler factory ships.

